

For the year Jan. 1-Dec. 31, 2024, or other tax year beginning 2024, ending

Your first name and middle initial: Randall S, Last name: Richardson, Your social security number: [redacted]

If joint return, spouse's first name and middle initial: Gretha C, Last name: Solorzano, Spouse's social security number: [redacted]

Home address (number and street). If you have a P.O. box, see instructions. [redacted] Apt. no. [redacted]

City, town, or post office. If you have a foreign address, also complete spaces below: [redacted] State: [redacted] ZIP code: [redacted]

Foreign country name: [redacted] Foreign province/state/country: [redacted] Foreign postal code: [redacted]

Presidential Election Campaign: Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. [redacted] You [redacted] Spouse

Filing Status: [] Single [] Head of household (HOH) [X] Married filing jointly (even if only one had income) [] Married filing separately (MFS) [] Qualifying surviving spouse (QSS)

Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent.

[] If treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, check the box and enter their name (see instructions and attach statement if required):

Digital Assets: At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) [X] No

Standard Deduction: Someone can claim: [] You as a dependent [] Your spouse as a dependent [] Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness: You: [] Were born before January 2, 1964 [] Are blind Spouse: [] Was born before January 2, 1964 [] Is blind

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions)	Child tax credit	Credit for other dependents
					[]	[]
					[]	[]
					[]	[]
					[]	[]

Income

1a Total amount from Form(s) W-2, box 1 (see instructions) 1a 181,156

b Household employee wages not reported on Form(s) W-2 1b

c Tip income not reported on line 1a (see instructions) 1c

d Medicaid waiver payments not reported on Form(s) W-2 (see instructions) 1d

e Taxable dependent care benefits from Form 2441, line 26 1e

f Employer-provided adoption benefits from Form 8839, line 29 1f

g Wages from Form 8919, line 6 1g

h Other earned income (see instructions) 1h 0

i Nontaxable combat pay election (see instructions) 1i

z Add lines 1a through 1h 1z 181,156

2a Tax-exempt interest 2a 20 b Taxable interest 2b 2,501

3a Qualified dividends 3a 7,201 b Ordinary dividends 3b 7,322

4a IRA distributions 4a b Taxable amount 4b 72,000

5a Pensions and annuities 5a b Taxable amount 5b 21,684

6a Social security benefits 6a 31,620 b Taxable amount 6b 26,877

c If you elect to use the lump-sum election method, check here (see instructions) []

7 Capital gain or (loss). Attach Schedule D if required. If not required, check here [] 7 12,856

8 Additional income from Schedule 1, line 10 8 0

9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income 9 324,396

10 Adjustments to income from Schedule 1, line 26 10 0

11 Subtract line 10 from line 9. This is your adjusted gross income 11 324,396

12 Standard deduction or itemized deductions (from Schedule A) 12 29,200

13 Qualified business income deduction from Form 8995 or Form 8995-A 13 5

14 Add lines 12 and 13. 14 29,205

15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income 15 295,191

Tax and Credits

16	Tax (see instructions). Check if any from Form 8814 ☐ 2 ☐ 4972 ☐ 3 ☐	16	55,217
17	Amount from Schedule 2, line 3	17	0
18	Add lines 16 and 17	18	55,217
19	Child tax credit or credit for other dependents from Schedule 8812	19	
20	Amount from Schedule 3, line 8	20	281
21	Add lines 19 and 20	21	281
22	Subtract line 21 from line 18. If zero or less, enter -0-	22	54,936
23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	862
24	Add lines 22 and 23. This is your total tax	24	55,798

Payments

25	Federal income tax withheld from:				
a	Form(s) W-2	25a	32,616		
b	Form(s) 1099	25b	17,761		
c	Other forms (see instructions)	25c	105		
d	Add lines 25a through 25c	25d	50,482		
26	2024 estimated tax payments and amount applied from 2023 return	26	0		
27	Earned income credit (EIC)	27			
28	Additional child tax credit from Schedule 8812	28			
29	American opportunity credit from Form 8863, line 8	29			
30	Reserved for future use	30			
31	Amount from Schedule 3, line 15	31	0		
32	Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	32	0		
33	Add lines 25d, 26, and 32. These are your total payments	33	50,482		

If you have a qualifying child, attach Sch. EIC.

Refund

34	If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	
35a	Amount of line 34 you want refunded to you. If Form 8888 is attached, check here ☐	35a	
b	Routing number XXXXXXXXXX	c	Type: ☐ Checking ☐ Savings
d	Account number XXXXXXXXXXXXXXXXXXXX		
36	Amount of line 34 you want applied to your 2025 estimated tax	36	

Amount You Owe

37	Subtract line 33 from line 24. This is the amount you owe. For details on how to pay, go to www.irs.gov/Payments or see instructions	37	5,316
38	Estimated tax penalty (see instructions)	38	0

Third Party Designee

Do you want to allow another person to discuss this return with the IRS? See instructions	☐ Yes. Complete below. ☒ No
Designee's name	Phone no.
	Personal identification number (PIN)

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has knowledge.

Your signature	Date	Your occupation Software Development	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
Spouse's signature. If a joint return, both must sign.	Date	Spouse's occupation Retired	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)

Joint return?
See instructions. Keep a copy for your records.

Phone no.	Email address
Preparer's name	Preparer's signature
Date	PTIN
Check if: ☐ Self-employed	
Firm's name	Phone no.
Firm's address	Firm's EIN

SCHEDULE 2
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Taxes

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

2024

Attachment
Sequence No. 02

Name(s) shown on Form 1040, 1040-SR, or 1040-NR

Randall S Richardson

Your social security number

Part I Tax

1	Additions to tax:		
a	Excess advance premium tax credit repayment. Attach Form 8962	1a.	
b	Repayment of new clean vehicle credit(s) transferred to a registered dealer from Schedule A (Form 8936), Part II. Attach Form 8936 and Schedule A (Form 8936)	1b.	0
c	Repayment of previously owned clean vehicle credit(s) transferred to a registered dealer from Schedule A (Form 8936), Part IV. Attach Form 8936 and Schedule A (Form 8936)	1c.	0
d	Recapture of net EPE from Form 4255, line 2a, column (i)	1d.	
e	Excessive payments (EP) from Form 4255. Check applicable box and enter amount. (i) ☐ Line 1a, column (n) (ii) ☐ Line 1c, column (n) (iii) ☐ Line 1d, column (n) (iv) ☐ Line 2a, column (n)	1e.	
f	20% EP from Form 4255. Check applicable box and enter amount. See instructions. (i) ☐ Line 1a, column (o) (ii) ☐ Line 1c, column (o) (iii) ☐ Line 1d, column (o) (iv) ☐ Line 2a, column (o)	1f.	
y	Other additions to tax (see instructions):	1y.	0
z	Add lines 1a through 1y	1z.	0
2	Alternative minimum tax. Attach Form 6251	2.	0
3	Add lines 1z and 2. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 17	3.	0

Part II Other Taxes

4	Self-employment tax. Attach Schedule SE	4.	0
5	Social security and Medicare tax on unreported tip income. Attach Form 4137	5.	0
6	Uncollected social security and Medicare tax on wages. Attach Form 8919	6.	
7	Total additional social security and Medicare tax. Add lines 5 and 6.	7.	0
8	Additional tax on IRAs or other tax-favored accounts. Attach Form 5329 if required. If not required, check here ☐	8.	0
9	Household employment taxes. Attach Schedule H	9.	0
10	Repayment of first-time homebuyer credit. Attach Form 5405 if required	10.	0
11	Additional Medicare Tax. Attach Form 8959	11.	0
12	Net investment income tax. Attach Form 8960	12.	.862
13	Uncollected social security and Medicare or RRTA tax on tips or group-term life insurance from Form W-2, box 12	13.	0
14	Interest on tax due on installment income from the sale of certain residential lots and timeshares	14.	
15	Interest on the deferred tax on gain from certain installment sales with a sales price over \$150,000	15.	
16	Recapture of low-income housing credit. Attach Form 8611	16.	

(continued on page 2)

Part III Other Taxes (continued)

17 Other additional taxes:			
a	Recapture of other credits. List type, form number, and amount:	17a	0
b	Recapture of federal mortgage subsidy, if you sold your home see instructions	17b	
c	Additional tax on HSA distributions. Attach Form 8889.	17c	0
d	Additional tax on an HSA because you didn't remain an eligible individual. Attach Form 8889.	17d	0
e	Additional tax on Archer MSA distributions. Attach Form 8853	17e	0
f	Additional tax on Medicare Advantage MSA distributions. Attach Form 8853	17f	0
g	Recapture of a charitable contribution deduction related to a fractional interest in tangible personal property	17g	
h	Income you received from a nonqualified deferred compensation plan that fails to meet the requirements of section 409A	17h	
i	Compensation you received from a nonqualified deferred compensation plan described in section 457A	17i	
j	Section 72(m)(5) excess benefits tax.	17j	
k	Golden parachute payments	17k	0
l	Tax on accumulation distribution of trusts	17l	
m	Excise tax on insider stock compensation from an expatriated corporation	17m	
n	Look-back interest under section 167(g) or 460(b) from Form 8697 or 8866	17n	
o	Tax on non-effectively connected income for any part of the year you were a nonresident alien from Form 1040-NR	17o	
p	Any interest from Form 8621, line 16f, relating to distributions from, and dispositions of, stock of a section 1291 fund	17p	
q	Any interest from Form 8621, line 24	17q	
z	Any other taxes. List type and amount:	17z	0
18	Total additional taxes. Add lines 17a through 17z	18	0
19	Recapture of net EPE from Form 4255, line 1d, column (I)	19	
20	Section 965 net tax liability installment from Form 965-A	20	
21	Add lines 4, 7 through 16, 18, and 19. These are your total other taxes. Enter here and on Form 1040 or 1040-SR, line 23, or Form 1040-NR, line 23b	21	862

K/A

SCHEDULE 3
(Form 1040)

Department of the Treasury
Internal Revenue Service

Additional Credits and Payments

Attach to Form 1040, 1040-SR, or 1040-NR.
Go to www.irs.gov/Form1040 for instructions and the latest information.

OMB No. 1545-0074

2024

Attachment
Sequence No. 03

Name(s) shown on Form 1040, 1040-SR, or 1040-NR

Randall S Richardson

Your social security number

Part I Nonrefundable Credits

1	Foreign tax credit. Attach Form 1116 if required	1.	281
2	Credit for child and dependent care expenses from Form 2441, line 11. Attach Form 2441	2.	
3	Education credits from Form 8863, line 19	3.	0
4	Retirement savings contributions credit. Attach Form 8880	4.	0
5a	Residential clean energy credit from Form 5695, line 15	5a.	
b	Energy efficient home improvement credit from Form 5695, line 32	5b.	
6	Other nonrefundable credits:		
a	General business credit. Attach Form 3800	6a.	0
b	Credit for prior year minimum tax. Attach Form 8801	6b.	0
c	Adoption credit. Attach Form 8839	6c.	0
d	Credit for the elderly or disabled. Attach Schedule R	6d.	0
e	Reserved for future use	6e.	
f	Clean vehicle credit. Attach Form 8936	6f.	0
g	Mortgage interest credit. Attach Form 8396	6g.	0
h	District of Columbia first-time homebuyer credit. Attach Form 8859	6h.	0
i	Qualified electric vehicle credit. Attach Form 8834	6i.	
j	Alternative fuel vehicle refueling property credit. Attach Form 8911	6j.	
k	Credit to holders of tax credit bonds. Attach Form 8912	6k.	
l	Amount on Form 8978, line 14. See instructions	6l.	
m	Credit for previously owned clean vehicles. Attach Form 8936	6m.	0
z	Other nonrefundable credit: type and amount:	6z.	
7	Total other nonrefundable credits. Add lines 6a through 6z	7.	0
8	Add lines 1 through 4, 5a, 5b, and 7. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 820	820	281

Part II Other Payments and Refundable Credits

9	Net premium tax credit. Attach Form 8962	9.	
10	Amount paid with request for extension to file (see instructions)	10.	
11	Excess social security and tier 1 RRTA tax withheld	11.	0
12	Credit for federal tax on fuels. Attach Form 4136	12.	
13	Other payments or refundable credits:		
a	Form 2439	13a.	0
b	Section 1341 credit for repayment of amounts included in income from earlier years	13b.	
c	Net elective payment election amount from Form 3800, Part III, line 6, column (j)	13c.	
d	Deferred amount of net 965 tax liability (see instructions)	13d.	
z	Other refundable credits (see instructions):	13z.	0
14	Total other payments or refundable credits. Add lines 13a through 13z	14.	0
15	Add lines 9 through 12 and 14. Enter here and on Form 1040, 1040-SR, or 1040-NR, line 3115	3115.	0

KIA For Paperwork Reduction Act Notice, see your tax return instructions.

Schedule 3 (Form 1040) 2024

Schedule D (Form 1040) 2024

SCHEDULE D
(Form 1040)

Capital Gains and Losses

OMB No. 1545-0074

2024

Department of the Treasury
Internal Revenue Service

Attach to Form 1040, 1040-SR, or 1040-NR.
Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9, and 10.
Go to www.irs.gov/ScheduleD for instructions and the latest information.

Attachment
Sequence No. 12

Name(s) shown on return

Randall S Richardson

Your social security number

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year? ☒ No
If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

Part I Short-Term Capital Gains and Losses—Generally Assets Held One Year or Less (see instructions)

See instructions for how to figure the amounts to enter on the lines below.
This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b	17,778	16,765		1,013
1b Totals for all transactions reported on Form(s) 8949 with Box A checked	0	0	0	0
2 Totals for all transactions reported on Form(s) 8949 with Box B checked	0	0	0	0
3 Totals for all transactions reported on Form(s) 8949 with Box C checked	0	0	0	0
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824			4	0
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your Capital Loss Carryover Worksheet in the instructions.			6	0
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). If you have any long-term capital gains or losses, go to Part II below. Otherwise, go to Part III on page 2			7	1,013

Part II Long-Term Capital Gains and Losses—Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below.
This form may be easier to complete if you round off cents to whole dollars.

	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b	73,697	61,850		11,847
8b Totals for all transactions reported on Form(s) 8949 with Box D checked	988	999	5	-6
9 Totals for all transactions reported on Form(s) 8949 with Box E checked	253	251	0	2
10 Totals for all transactions reported on Form(s) 8949 with Box F checked	0	0	0	0
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824			11	0
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1			12	
13 Capital gain distributions. See the instructions			13	0
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your Capital Loss Carryover Worksheet in the instructions			14	0
15 Net long-term capital gain or (loss). Combine lines 8a through 14 in column (h). Then, go to Part III on page 2			15	11,843

Part III Summary

16	Combine lines 7 and 15 and enter the result.	16	12,856
• If line 16 is a gain, enter the amount from line 16 on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 17 below. • If line 16 is a loss, skip lines 17 through 20 below. Then, go to line 21. Also be sure to complete line 22. • If line 16 is zero, skip lines 17 through 21 below and enter -0- on Form 1040, 1040-SR, or 1040-NR, line 7. Then, go to line 22.			
17	Are lines 15 and 16 both gains?		
	☒ Yes. Go to line 18.		
	☐ No. Skip lines 18 through 21, and go to line 22.		
18	If you are required to complete the 28% Rate Gain Worksheet (see instructions), enter the amount, if any, from line 7 of that worksheet.	18	0
19	If you are required to complete the Unrecaptured Section 1250 Gain Worksheet (see instructions), enter the amount, if any, from line 18 of that worksheet.	19	0
20	Are lines 18 and 19 both zero or blank and you are not filing Form 4952?		
	☒ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040, line 16. Don't complete lines 21 and 22 below.		
	☐ No. Complete the Schedule D Tax Worksheet in the instructions. Don't complete lines 21 and 22 below.		
21	If line 16 is a loss, enter here and on Form 1040, 1040-SR, or 1040-NR, line 7, the smaller of:		
	• The loss on line 16; or		
	• (\$3,000), or if married filing separately, (\$1,500)	21	()
Note: When figuring which amount is smaller, treat both amounts as positive numbers.			
22	Do you have qualified dividends on Form 1040, 1040-SR, or 1040-NR, line 3a?		
	☐ Yes. Complete the Qualified Dividends and Capital Gain Tax Worksheet in the instructions for Forms 1040, line 16.		
	☐ No. Complete the rest of Form 1040, 1040-SR, or 1040-NR.		

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on page 1. Security number or taxpayer identification number

Randall S Richardson

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Important: Long-Term. Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for more of the boxes, complete as many forms with the same box checked as you need.

☒ (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)

☐ (E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS

☐ (F) Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (e) in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (g), enter a code in column (f). See the separate instructions.		(g), (h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	2.0 UNH	06/05/23	06/07/24	988	999	W	5	-6
								0
								0
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Note: If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and in column (g) the adjustment to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Name(s) shown on return. Name and SSN or taxpayer identification no. not required if shown on page 2. Security number or taxpayer identification number
 Randall S Richardson

Before you check Box D, E, or F below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check.

Part III Long-Term. Transactions involving capital assets you held more than 1 year are generally long-term (see instructions). For short-term transactions, see page 1.

Note: You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 8a; you aren't required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for more of the boxes, complete as many forms with the same box checked as you need.

- ☐ (D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
☒ (E) Long-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS
☐ (F) Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold or disposed of (Mo., day, yr.)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see Column (g) in the separate instructions.	Adjustment, if any, to gain or loss. If you enter an amount in column (f), enter a code in column (g). See the separate instructions.		(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g).
						(f) Code(s) from instructions	(g) Amount of adjustment	
	5 ISHARES Ultra STB ETF	03/19/23	05/23/24	253	251		0	2
								0
								0
								0
								0
								0
								0
								0
								0
								0
								0
								0
								0
								0
								0
								0
2	Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked)				253	251	0	2

Note: If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

**Qualified Business Income Deduction
Simplified Computation**

OMB No. 1545-2294

Department of the Treasury
Internal Revenue Service

Attach to your tax return.

Go to www.irs.gov/Form8995 for instructions and the latest information.**2024**Attachment
Sequence No. 55

Name(s) shown on return

Randall S Richardson

Your taxpayer identification number

Note: You can claim the qualified business income deduction only if you have qualified business income from a qualified trade business, real estate investment trust dividends, publicly traded partnership income, or a domestic production activities deduction passed through from an agricultural or horticultural cooperative. See instructions.

Use this form if your taxable income, before your qualified business income deduction, is at or below \$191,950 (\$383,900 if filing jointly), and you aren't a patron of an agricultural or horticultural cooperative.

1	(a) Trade, business, or aggregation name	(b) Taxpayer identification number	(c) Qualified business income or (loss)
i			
ii			
iii			
iv			
v			

2	Total qualified business income or (loss). Combine lines 1i through 1v, column (c)	2	0	
3	Qualified business net (loss) carryforward from the prior year	3	(0)	
4	Total qualified business income. Combine lines 2 and 3. If zero or less, enter -0-	4	0	
5	Qualified business income component. Multiply line 4 by 20% (0.20)	5	0	
6	Qualified REIT dividends and publicly traded partnership (PTP) income or (loss) (see instructions)	6	26	
7	Qualified REIT dividends and qualified PTP (loss) carryforward from the prior year	7	(0)	
8	Total qualified REIT dividends and PTP income. Combine lines 6 and 7. If zero or less, enter -0-	8	26	
9	REIT and PTP component. Multiply line 8 by 20% (0.20)	9	5	
10	Qualified business income deduction before the income limitation. Add lines 5 and 9	10	5	
11	Taxable income before qualified business income deduction (see instructions)	11	295,196	
12	Enter your net capital gain, if any, increased by any qualified dividends (see instructions)	12	19,044	
13	Subtract line 12 from line 11. If zero or less, enter -0-	13	276,152	
14	Income limitation. Multiply line 13 by 20% (0.20)	14	55,230	
15	Qualified business income deduction. Enter the smaller of line 10 or line 14. Also enter this amount on the applicable line of your return (see instructions).	15	5	
16	Total qualified business (loss) carryforward. Combine lines 2 and 3. If greater than zero, enter -0-	16	(0)	
17	Total qualified REIT dividends and PTP (loss) carryforward. Combine lines 6 and 7. If greater than zero, enter -0-	17	(0)	

Additional Medicare Tax

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

If any line does not apply to you, leave it blank. See separate instructions.

Attach to Form 1040, 1040-SR, 1040-NR, or 1040-SS.

Go to www.irs.gov/Form8959 for instructions and the latest information.**2024**Attachment
Sequence No. 71

Name(s) shown on return

Randall S Richardson

Your social security number

Part I Additional Medicare Tax on Medicare Wages

1	Medicare wages and tips from Form W-2, box 5. If you have more than one Form W-2, enter the total of the amounts from box 5	1	211,656	
2	Unreported tips from Form 4137, line 6.	2	0	
3	Wages from Form 8919, line 6	3		
4	Add lines 1 through 3	4	211,656	
5	Enter the following amount for your filing status: Married filing jointly \$250,000 Married filing separately \$125,000 Single, Head of household, or Qualifying surviving spouse \$200,000	5	250,000	
6	Subtract line 5 from line 4. If zero or less, enter -0-	6		0
7	Additional Medicare Tax on Medicare wages. Multiply line 6 by 0.9% (0.009). Enter here and go to Part II	7		0

Part II Additional Medicare Tax on Self-Employment Income

8	Self-employment income from Schedule SE (Form 1040), Part I, line 6. If you had a loss, enter -0-	8	0	
9	Enter the following amount for your filing status: Married filing jointly \$250,000 Married filing separately \$125,000 Single, Head of household, or Qualifying surviving spouse \$200,000	9	250,000	
10	Enter the amount from line 4	10	211,656	
11	Subtract line 10 from line 9. If zero or less, enter -0-	11	38,344	
12	Subtract line 11 from line 8. If zero or less, enter -0-	12		0
13	Additional Medicare Tax on self-employment income. Multiply line 12 by 0.9% (0.009). Enter here and go to Part III	13		0

Part III Additional Medicare Tax on Railroad Retirement Tax Act (RRTA) Compensation

14	Railroad retirement (RRTA) compensation and tips from Form(s) W-2, box 14 (see instructions).	14	0	
15	Enter the following amount for your filing status: Married filing jointly \$250,000 Married filing separately \$125,000 Single, Head of household, or Qualifying surviving spouse \$200,000	15	250,000	
16	Subtract line 15 from line 14. If zero or less, enter -0-	16		0
17	Additional Medicare Tax on railroad retirement (RRTA) compensation. Multiply line 16 by 0.9% (0.009). Enter here and go to Part IV	17		0

Part IV Total Additional Medicare Tax

18	Add lines 7, 13, and 17. Also include this amount on Schedule 2 (Form 1040), line 11 (Form 1040-SS filers, see instructions), and go to Part V.	18		0
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Part V Withholding Reconciliation

19	Medicare tax withheld from Form W-2, box 6. If you have more than one Form W-2, enter the total of the amounts from box 6	19	3,174	
20	Enter the amount from line 1	20	211,656	
21	Multiply line 20 by 1.45% (0.0145). This is your regular Medicare tax withholding on Medicare wages	21	3,069	
22	Subtract line 21 from line 19. If zero or less, enter -0-. This is your Additional Medicare Tax withholding on Medicare wages	22		105
23	Additional Medicare Tax withholding on railroad retirement (RRTA) compensation from Form W-2, box 14 (see instructions)	23		0
24	Total Additional Medicare Tax withholding. Add lines 22 and 23. Also include this amount with federal income tax withholding on Form 1040, 1040-SR, or 1040-NR, line 25c (Form 1040-SS filers, see instructions)	24		105

**Net Investment Income Tax—
Individuals, Estates, and Trusts**

OMB No. 1545-2227

2024Department of the Treasury
Internal Revenue Service

Attach to your tax return.

Go to www.irs.gov/Form8960 for instructions and the latest information.Attachment
Sequence No. 72

Name(s) shown on your tax return

Your social security number or EIN

Randall S Richardson

- Part I** Investment Income ☐ Section 6013(g) election (see instructions)
☐ Section 6013(h) election (see instructions)
☐ Regulations section 1.1411-10(g) election (see instructions)

1	Taxable interest (see instructions).	1.	2,501
2	Ordinary dividends (see instructions).	2.	7,322
3	Annuities (see instructions).	3.	0
4a	Rental real estate, royalties, partnerships, S corporations, trusts, trades or businesses, etc. (see instructions).	4a	0
b	Adjustment for net income or loss derived in the ordinary course of a non-section 1411 trade or business (see instructions).	4b	0
c	Combine lines 4a and 4b.	4c	0
5a	Net gain or loss from disposition of property (see instructions).	5a	12,856
b	Net gain or loss from disposition of property that is not subject to net investment income tax (see instructions).	5b	
c	Adjustment from disposition of partnership interest or S corporation stock (see instructions).	5c	
d	Combine lines 5a through 5c.	5d	12,856
6	Adjustments to investment income for certain CFCs and PFICs (see instructions).	6	
7	Other modifications to investment income (see instructions).	7	0
8	Total investment income. Combine lines 1, 2, 3, 4c, 5d, 6, and 7.	8.	22,679

Part II Investment Expenses Allocable to Investment Income and Modifications

9a	Investment interest expenses (see instructions).	9a	
b	State, local, and foreign income tax (see instructions).	9b	0
c	Miscellaneous investment expenses (see instructions).	9c	
d	Add lines 9a, 9b, and 9c.	9d	0
10	Additional modifications (see instructions).	10.	0
11	Total deductions and modifications. Add lines 9d and 10.	11	0

Part III Tax Computation

12	Net investment income. Subtract Part II, line 11, from Part I, line 8. Individuals, complete lines 13-17. Estates and trusts, complete lines 18a-21. If zero or less, enter -0-.	12	22,679
13	Modified adjusted gross income (see instructions).	13	324,396
14	Threshold based on filing status (see instructions).	14	250,000
15	Subtract line 14 from line 13. If zero or less, enter -0-.	15	74,396
16	Enter the smaller of line 12 or line 15.	16	22,679
17	Net investment income tax for individuals. Multiply line 16 by 3.8% (0.038). Enter here and include on your tax return (see instructions).	17	862
18a	Net investment income (line 12 above).	18a	
b	Deductions for distributions of net investment income and charitable deductions (see instructions).	18b	
c	Undistributed net investment income. Subtract line 18b from line 18a (see instructions). If zero or less, enter -0-.	18c	
19a	Adjusted gross income (see instructions).	19a	
b	Highest tax bracket for estates and trusts for these years (see instructions).	19b	
c	Subtract line 19b from line 19a. If zero or less, enter -0-.	19c	
20	Enter the smaller of line 18c or line 19c.	20	
21	Net investment income tax for estates and trusts. Multiply line 20 by 3.8% (0.038). Enter here and include on your tax return (see instructions).	21	